

Daily Market Report

4 June 2024

JSE

JSE All-Share Index increased by 1.36% and closed at 77,746.23 points on Monday, as the Industrial, and Financial sectors recorded gains.

BRVM

BRVM Composite decreased by 0.04% to close at 225.20 points on Monday, with Air Liquide Côte d'Ivoire and Sitab Côte d'Ivoire being the top losers.

NSE

NGX All-Share Index decreased by 0.18% to close at 99,118.86 points on Monday, as the Banking, Oil & Gas, and Industrials sectors recorded losses.

EGX

The EGX 30 Index decreased by 0.13% and closed at 26,834.47 points on Monday, as market lost LE 6 billion of market cap amid Foreign and Arab selling.

ESG

Casablanca ESG 10 Index decreased by 0.07% to close at 964.54 points on Monday.

Capital Markets

JSE Johannesburg Stock Exchange	▲ 1.36%
BRVM Bourse Régionale des Valeurs Mobilières	▼ 0.04%
NGX Nigerian Stock Exchange	▼ 0.18%
EGX Egyptian Stock Exchange	▼ 0.13%
ESG Casablanca Stock Exchange	▼ 0.07%

African Markets

Nigeria: NGX 30 Index decreased by 0.25% and closed at 3,667.10 points on Monday. FBNH and Transcorp were the top losers.

Egypt: The EGX 30 Index decreased by 0.13% and closed at 26,834.47 points on Monday, as market lost LE 6 billion of market cap amid Foreign and Arab selling.

Kenya: NSE 20 Index increased by 0.18% and closed at 1,725.60 points on Monday. BK Group Plc and Total Kenya Ltd were the top gainers.

South Africa: JSE Top 40 increased by 1.38% and closed at 71,424.87 points on Monday, as the Industrial and Financial sectors recorded gains.

Nigeria Key Indicators

	Current
Inflation	33.69%
Exchange Rate (I&E window)	₦1,476.12
INTERBANK RATES	
OPR	29.18 ▲
Overnight	29.82 ▼

Other Emerging Markets

Abu Dhabi: ADX Index increased by 0.62% to close at 8,917.61 points on Monday, as gains in the Industrials, Real Estate, and Consumer Staples sectors pushed shares higher. MSCI UAE increased by 0.02% to close at 354.92 points.

Vietnam: VN-30 Index increased by 1.71% to close at 1,297.78 points on Monday, as blue-chip companies recorded gains. MSCI Vietnam increased by 1.62% to close at 447.06 points.

Saudi Arabia: Tadawul All Share Index increased by 1.58% to close at 11,808.25 points on Monday, as gains in the Media & Entertainment, Real Estate Mgmt. & Dev., and Consumer Durables & Apparel sectors pushed shares higher. MSCI Saudi Arabia increased by 1.52% to close at 1,477.38 points.

India: Nifty 50 index increased by 3.25% to close at 23,263.90 points on Monday, as the Oil & Gas, Real Estate, and Metal sectors pushed shares higher. MSCI India increased by 3.86% to close at 2,526.55.

News

Nigeria:

Amid Power Sector Illiquidity, Discos' Billing Rise N13.5bn
NEITI Strengthens Collaboration with PWYP on Contract Transparency
Aramco's \$12bn Stock Offer Sells Out in Hours

Kenya:

Safaricom signs deal on financial literacy
Kenya lags behind global peers in budget transparency
Kenya Sets Aside KSh 414Mn for Edible Oil Value Chain

Abu Dhabi:

An agreement signed to enhance UAE's manufacturing landscape
ADNOC L&S signs deal to acquire shipping pool operator Navig8 for \$1.49bn
Emaar announces Dhs1.5b expansion of Dubai Mall

Saudi Arabia:

Saudi Arabia, Brazil sign defense agreement
Saudi deputy minister for consular affairs welcomes Chinese envoy to Riyadh
Foreign ministers chair Saudi-Kuwaiti Coordination Council meeting

Egypt:

Egypt's Al Mashat meets with South Korean First Vice Minister to discuss partnership
Egypt's non-oil private sector slowdown softens in May
Egypt and Tanzania discuss water cooperation

South Africa:

Shell SA ponders next move after dismissal of oil exploration appeal
Pick n Pay paid booted CEO Boone R16m settlement
Glencore and Merafe repel electricity fee

India:

Baron marks up Swiggys valuation to over \$15 billion
Lenskart raises \$200 million, co valued at about \$5 billion
Adani makes credit card foray, ties up with ICICI Bank

Vietnam:

MoIT promotes market development in Northeast Asia
RoK pledges collaboration with Vietnam to fight IUU fishing
Thailand becomes Viet Nam's second largest durian importer

Indices and FX Data

Indices	Last Trade	1d%	WTD%	MTD%	YTD%	Currency/Commodity	Last Trade	1d%	YTD%
Abu Dhabi	8,917.61	0.6%	0.6%	0.6%	-6.9%	AED/USD	3.67	0.0%	0.01%
Egypt	26,834.47	-0.1%	-0.1%	-0.1%	8.1%	EGP/USD	47.10	-0.1%	52.0%
India	23,263.90	3.3%	3.3%	3.3%	7.1%	INR/USD	83.09	-0.4%	-0.2%
Kenya	1,725.60	0.2%	0.2%	0.2%	15.0%	KES/USD	130.50	0.0%	-16.9%
Nigeria	3,667.10	-0.3%	-0.3%	-0.3%	31.4%	NGN/USD	1,476.12	-0.7%	62.7%
Saudi Arabia	11,808.25	1.6%	1.6%	1.6%	-1.3%	SAR/USD	3.75	0.0%	0.02%
South Africa	71,424.87	1.4%	1.4%	1.4%	1.3%	ZAR/USD	18.53	-1.4%	1.3%
Vietnam	1,297.78	1.7%	1.7%	1.7%	14.7%	VND/USD	25,438.50	-0.05%	4.9%

MSCI Emerging Markets

MSCI Frontier	529.25	0.5%	0.5%	0.5%	4.4%	Brent Crude (\$)	78.36	-4.0%	1.7%
MSCI Frontier 100	1,141.14	0.5%	0.5%	0.5%	-1.6%	Gold (\$)	2,369.30	1.0%	14.4%
MSCI Emerging	1,069.31	1.9%	1.9%	1.9%	4.5%	Copper (\$)	10,143.00	1.0%	18.5%
MSCI World (USD)	3,453.44	0.2%	0.2%	0.2%	9.0%	Coffee (\$)	220.67	-4.3%	24.7%

STOCKS

Nigeria

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₦)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₦)
Custodian	10.25	10.0%	13.9%	20.53	Julius Berger	82.00	-4.8%	90.7%	20.71
Okomu Oil	255.70	9.7%	-1.7%	3.20	FCMB	8.00	-4.7%	8.1%	39.93
Guinness	49.85	6.7%	-24.5%	283.92	P Z Cussons	22.00	-1.8%	-17.6%	110.87
Geregu Power	1000.00	6.4%	150.6%	192.30					
United Capital PLC	19.10	3.2%	-17.0%	20.75					
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₦)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₦)
Geregu Power	1000.00	1000.00	0.0%	192.30	Nestle	905.00	764.90	18.3%	5.68
BUA Foods	379.90	379.90	0.0%	6.57	International Breweries	3.65	2.70	35.2%	0.85
FCMB	8.00	8.00	0.0%	39.93	Unilever	15.05	10.50	43.3%	2.31
Zenith	33.00	33.00	0.0%	236.28	Stanbic IBTC	52.00	24.50	112.2%	1.77
Wema	7.00	7.00	0.0%	11.62	Guaranty	40.00	18.00	122.2%	1887.74

Abu Dhabi

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn DH)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn DH)
Abu Dhabi National Co. for Building Materials	0.24	14.6%	0.4%	0.23	Gulf Medical Projects Company	1.79	-9.6%	-6.8%	0.00
RAK Co. for White Cement & Construction Materials	1.13	5.6%	-0.9%	0.115	AL KHALEEJ Investment	2.00	-9.1%	-3.4%	0.00
ADNOC Logistics & Services plc	4.24	4.2%	10.7%	48.3145	Hayah Ins. Co.	1.07	-6.1%	8.1%	0.01
Alpha Dhabi Holding PJSC	11.20	3.1%	-40.4%	64.77	Sudatel Telecom. Group Co. Ltd	0.25	-4.9%	-18.0%	0.01
First Abu Dhabi Bank	11.90	2.6%	-14.8%	70.69	APEX Investment	1.55	-4.9%	-21.3%	2.55
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn DH)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn DH)
Al Wathba National Insurance Co.	5.75	5.75	0.0%	0.00	ANAN Inv Hldg	4.07	4.07	0.0%	0.00
Al Dhafra Insurance Co.	5.80	5.80	0.0%	0.00	Sawaeed Holding	6.78	6.78	0.0%	0.00
Al Buhaira National Insurance Company	3.00	3.00	0.0%	0.00	United Fidelity Insurance Co.	1.60	1.60	0.0%	0.00
Al Fujairah National Insurance Company	210.00	210.00	0.0%	0.00	Multiply Group	1.88	1.88	0.0%	45.80
Al Khazna Insurance Co.	0.24	0.24	0.0%	0.00	Invest Bank	0.45	0.45	0.0%	0.00

Egypt

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn E£)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn E£)
QALA For Financial Investments	1.97	10.7%	-27.3%	186.58	Misr Fertilizers Production Co.	41.04	-3.5%	-36.1%	150.35
Ibsina Pharma	2.75	5.8%	-12.4%	66.01	Alexandria Mineral Oils Company	9.35	-2.8%	-5.2%	67.77
Orascom Development Egypt	11.41	5.4%	2.8%	38.27	Belton Financial Holding	2.87	-2.7%	-14.1%	79.68
Oriental Weavers	21.00	5.0%	24.2%	66.09	Sidi Kerir Petrochemicals	29.92	-1.9%	2.9%	25.86
EFG Holding	17.02	4.7%	4.3%	524.87	Commercial International Bank	76.52	-1.5%	5.3%	252.56
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn E£)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn E£)
Misr Fertilizers Production Company	41.04	41.04	0.0%	150.35	Egyptian Kuwaiti Holding	30.67	30.67	0.0%	11.32
Commercial International Bank	76.52	76.52	0.0%	252.56	QALA For Financial Investments	1.97	1.75	12.6%	186.58
ELSWEDY Electric	46.15	49.00	-5.8%	230.51	Belton Financial Holding	2.87	2.38	20.6%	79.68
Heliopolis Housing	11.15	13.95	-20.1%	145.36	EFG Holding	17.02	13.90	22.4%	524.87
Ezz Steel	75.20	94.90	-20.8%	73.67	Alexandria Mineral Oils Company	9.35	6.95	34.5%	67.77

India

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn ₹)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn ₹)
Adani Ports And Sez.	1590.00	10.6%	55.2%	3693.97	Eicher Motors	4670.00	-1.3%	12.7%	501.56
State Bank Of India	909.05	9.5%	41.6%	5721.23	LTIMINDTREE Ltd	4649.40	-1.1%	-26.1%	209.66
NTPC	392.50	9.3%	26.1%	1514.34	HCL Technologies	1316.50	-0.6%	-10.2%	711.61
Power Grid Corp Of India	338.00	9.0%	42.5%	1866.40	Sun Pharma Industries	1455.20	-0.3%	15.5%	271.67
ONGC	284.00	7.4%	38.5%	847.55	Asian Paints	2875.00	-0.2%	-15.5%	274.53
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn ₹)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn ₹)
Reliance Industries	3027.75	3029.00	0.0%	3205.59	LTIMINDTREE Ltd	4649.40	4565.50	1.8%	209.66
State Bank of India	909.05	912.00	-0.3%	5721.23	HDFC Life Insurance Co. Ltd	551.10	538.00	2.4%	511.05
Mahindra & Mahindra	2641.80	2654.35	-0.5%	710.85	Asian Paints	2875.00	2670.10	7.7%	274.53
Larsen & Toubro	3900.45	3919.90	-0.5%	2238.11	ITC	431.40	399.35	8.0%	668.33
Icici Bank	1164.90	1173.00	-0.7%	2964.95	HUL	2355.55	2172.05	8.4%	285.19

Kenya

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn KSh)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn KSh)
BK Group Plc	34.00	7.3%	-5.0%	0.02	Centum Inv. Co. Plc	7.92	-9.2%	-5.7%	20.82
Total Kenya Ltd	23.50	6.6%	30.6%	0.04	Kengen Limited	2.33	-2.9%	15.9%	3.17
Bamburi Cement Limited	43.30	5.2%	20.8%	0.45	East African Breweries Limited	155.25	-1.7%	36.2%	5.88
CIC Insurance Group Ltd	2.28	1.8%	0.9%	0.07	KCB Group Plc	35.30	-0.7%	61.2%	275.47
The Cooperative Bank of Kenya Ltd	13.65	1.1%	19.7%	34.01	Absa Bank Kenya	13.70	-0.4%	19.7%	2.67
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn KSh)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn KSh)
Absa Bank Kenya	13.70	14.30	-4.2%	2.67	British American Tobacco Kenya Ltd	369.25	400.00	-7.7%	1.96
Standard Chartered Bank Kenya Ltd	187.75	200.00	-6.1%	2.68	Centum Inv. Co. Plc	7.92	7.60	4.2%	20.82
NCBA Group Plc	42.00	45.00	-6.7%	10.92	Stanbic Holdings	110.00	90.00	22.2%	54.00
BK Group Plc	34.00	37.00	-8.1%	0.02	BK Group Plc	34.00	26.50	28.3%	0.02
Total Kenya Ltd	23.50	26.00	-9.6%	0.04	Kenya Power & Lighting Limited	1.67	1.30	28.5%	0.42

Saudi Arabia

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn SAR)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn SAR)
Saudi Research and Marketing Group	220.00	10.0%	28.4%	39.31	Saudi Pharma Ind. and Medical Appliances Corp.	29.50	-3.8%	-22.0%	154.14
Etiihad Atheeb Telecommunication Co.	111.60	7.1%	-34.2%	151.34	Astra Industrial Group	142.00	-3.4%	6.6%	85.56
Aljazira Takaful Taawuni Co.	18.50	6.9%	8.8%	12.78	ACWA POWER Co.	407.00	-3.1%	58.4%	235.36
Jabal Omar Development Co.	25.70	6.8%	14.7%	71.49	Middle East Specialized Cables	33.00	-2.4%	47.7%	37.47
Taiba Investments Co.	41.30	6.4%	54.4%	11.10	Aldrees Petroleum and Transport Svs.	116.60	-2.4%	-34.3%	79.31
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn SAR)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn SAR)
Sustained Infrastructure Holding Co.	35.95	35.95	0.0%	8.55	Abdullah Al Othaim Markets Co.	11.20	11.20	0.0%	41.59
MBC Group Co.	46.40	46.40	0.0%	27.97	Abdulmohsen Alhokair Group for Tourism and Dev.	2.51	2.51	0.0%	4.49
LIVA Insurance Co.	18.30	18.30	0.0%	2.07	Advanced Petrochemical Co.	40.40	40.40	0.0%	28.81
SAL Saudi Logistics Services Co.	263.20	263.20	0.0%	138.62	Al Kathiri Holding Co.	2.73	2.73	0.0%	4.08
Lumi Rental Co.	89.90	89.90	0.0%	39.20	AL-Baha Inv. and Development Co.	0.14	0.14	0.0%	2.83

South Africa

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn R)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn R)
Remgro Ltd	12809.00	6.1%	-10.4%	22800.02	Sasol Ltd	11600.00	-6.5%	14.9%	44428.00
Sanlam Ltd	7411.00	4.6%	10.2%	39871.18	Northam Platinum Holdings Ltd	12356.00	-4.7%	-19.9%	19275.36
Capitec Bank Holdings Ltd	222726.00	4.6%	-2.9%	82854.07	Impala Platinum Holdings Ltd	9405.00	-2.2%	22.9%	42322.50
Vodacom Group Ltd	9627.00	4.1%	0.6%	13766.61	Exxaro Resources Ltd	17800.00	-1.9%	2.1%	8615.20
Discovery Ltd	11410.00	4.0%	44.1%	28182.70	Sibanye Stillwater Ltd	2321.00	-1.7%	-21.5%	23558.15
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn R)	Stocks near 52 w Low	Last Price	52w L	% Change	Val (mn R)
Prosus NV	68100.00	68100.00	0.0%	91254.00	Discovery Ltd	11410.00	11410.00	0.0%	28182.70
Naspers Ltd	380000.00	380000.00	0.0%	167580.00	MTN Group Ltd	8439.00	8439.00	0.0%	31308.69
Mr Price Group Ltd	18231.00	18231.00	0.0%	24429.54	Sasol Ltd	11600.00	11600.00	0.0%	44428.00
Capitec Bank Holdings Ltd	222726.00	222726.00	0.0%	82854.07	Woolworths Holdings Ltd	5546.00	5546.00	0.0%	19743.76
Aspen Pharmacare Holdings Ltd	23311.00	23311.00	0.0%	16061.28	Remgro Ltd	12809.00	12605.00	1.6%	22800.02

Vietnam

Top 5 Gainers	Last Price	1d%	YTD%	Value (mn đ)	Top 5 Losers	Last Price	1d%	YTD%	Val (mn đ)
Investment & Industrial Development JS Corp.	8700.00	4.2%	-86.2%	38.32	Masan Group Corp	25350.00	-6.1%	-62.2%	110.50
Vinamilk	63000.00	3.6%	-6.8%	64107.99	Military Commercial Bank	16050.00	-3.9%	-13.9%	74.20
Vietcombank	60900.00	2.7%	-24.2%	1478.50	Viet Nam International Commercial JS Bank	49750.00	-3.0%	153.8%	4.98
Bank for Inv. and Devp	4620.00	1.8%	-89.4%	1039.81	Sai Gon Thuong Tin Commercial	19600.00	-2.0%	-29.9%	36.77
Ho Chi Minh City Devp	43600.00	1.3%	114.8%	961.79	Vietnam Rubber Group JSC	14300.00	-1.4%	-32.5%	185.24
Stocks near 52 w high	Last Price	52w H	% Change	Value (mn đ)	Stocks near 52 w Low	Last Price	52w L	% Change	Value (mn đ)
Vincom Retail	38300.00	38300.00	0.0%	88.10	Asia Commercial JS Bank	11900.00	11900.00	0.0%	65384.36
Vietnam Prosperity	38300.00	38300.00	0.0%	18273.49	Inv. & Industrial Development JS C	8700.00	8700.00	0.0%	38.32
Viet Nam International Commercial Joint Stock Bank	49750.00	49750.00	0.0%	4.98	Bank for Inv. and Devp	4620.00	4620.00	0.0%	1039.81
Saigon-Hanoi Commercial Bank	34000.00	34000.00	0.0%	82275.48	BaoViet Holdings	13400.00	13400.00	0.0%	76.23
Ho Chi Minh City Devp	43600.00	43600.00	0.0%	961.79	Vietnam JSC Bank	5360.00	5360.00	0.0%	1796.72

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